SUPPLIER

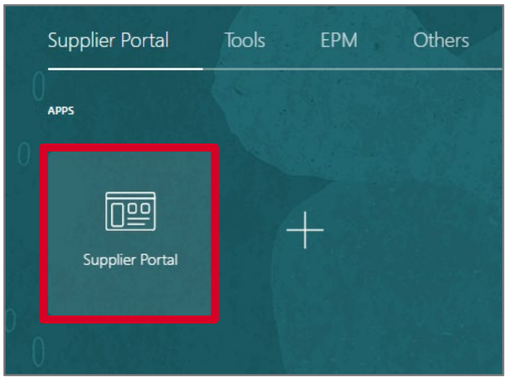
SUBMIT AN INVOICE OR CREDIT MEMO

Purpose: This job aid provides the steps for submitting invoices and credit memos.

Submit an Invoice or Credit Memo from a PO

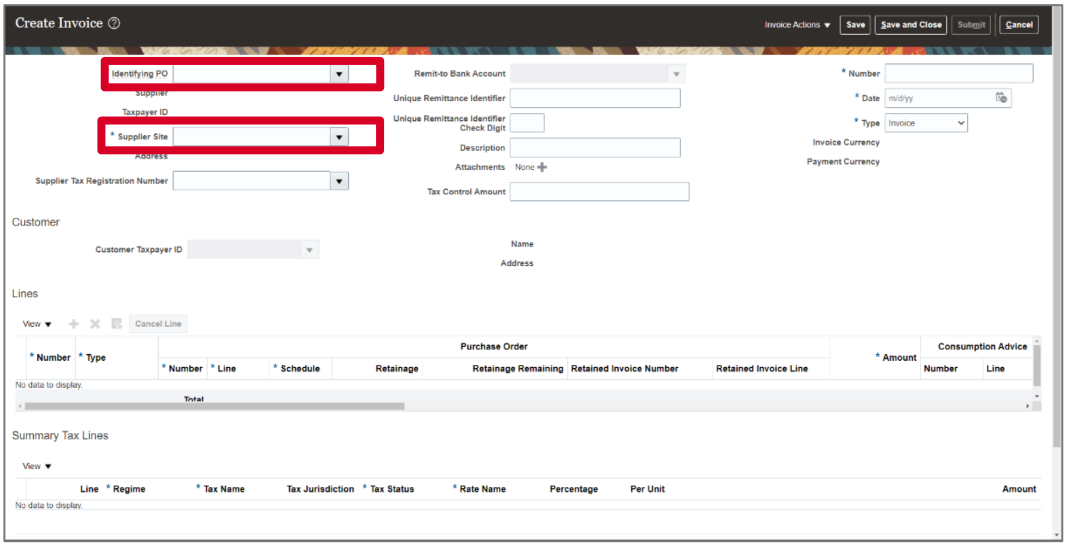
1. From the Oracle Homepage, click **Supplier Portal**. If you don't see the Oracle Homepage pictured below, click **Home** in the upper-right corner of the screen.

   Note: *if you do not already have access to Supplier Portal, navigate to https://www.republicservices.com/suppliers/supplier-register and scroll to the bottom of the screen to request access.*

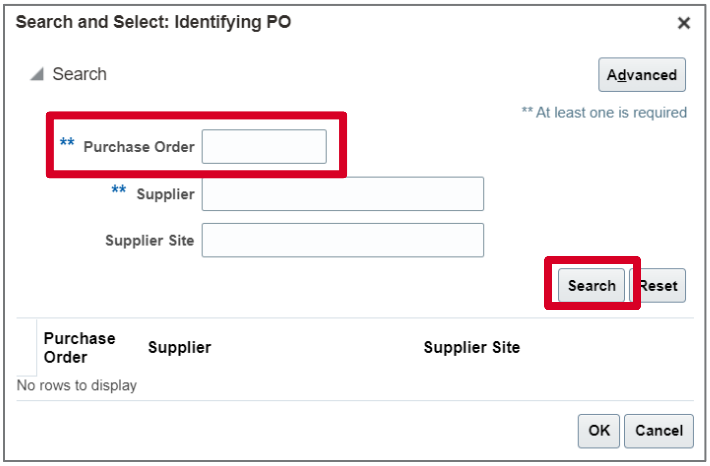


2. Click **Create Invoice** from the Tasks list on the left side of the screen.

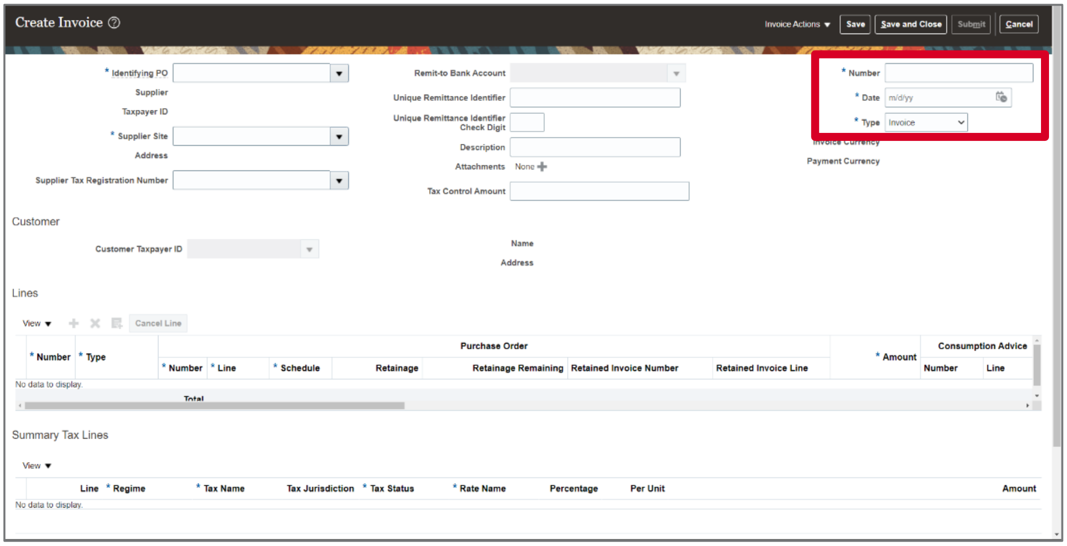
3. Select the **Identifying PO** from the drop-down menu. Once an Identifying PO is selected, the Supplier Site auto-populates. If the Supplier Site doesn't populate, select the appropriate site from the **Supplier Site** drop-down menu.



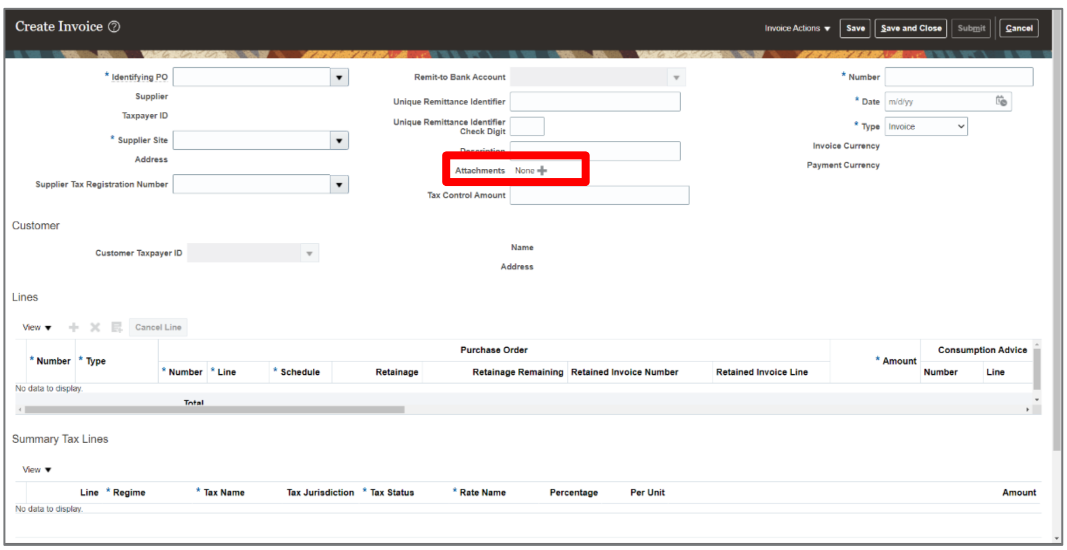
__Note:__ If you are unable to find the PO Number, click the drop-down arrow and select Search. From the Search and Select screen, enter the __Purchase Order__ number, then click __Search__.



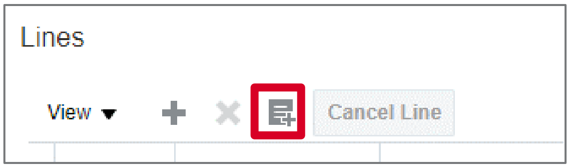
4. Enter additional Invoice Header information including the **Number**, **Date**, and **Type** (i.e., Invoice, Credit Memo).



5. To add a PDF of the invoice, click the **Attachments +** icon and select the appropriate file.

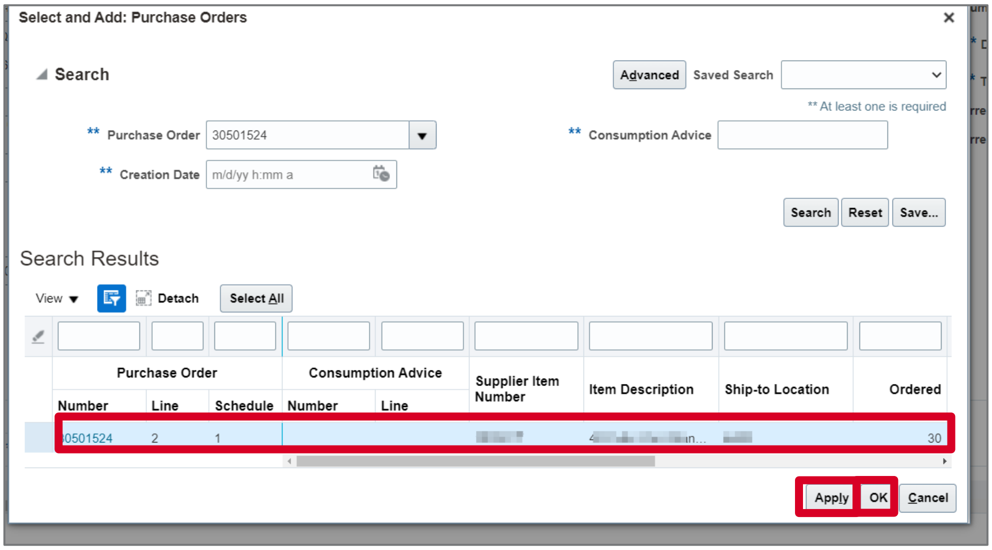


6. In the Lines Section, click the select and add icon.



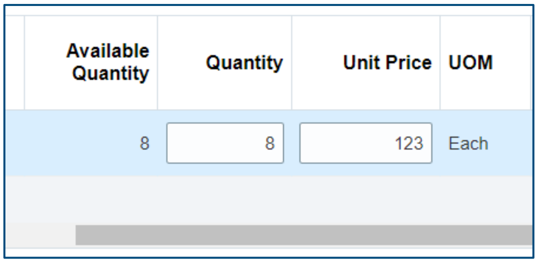
7. Select the Lines you would like to add to the Invoice or Credit Memo, then click **Apply** and **OK**. The line will be added to the Invoice.

Note: *To add multiple lines, press and hold the* ***CTRL key*** *and select the appropriate lines. Lines added to an invoice will be a positive value. Lines added to a credit memo default to a negative value.*

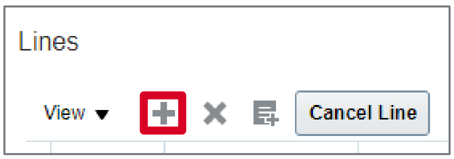


8. Confirm the accuracy of the quantity and unit price of the Lines you added to the invoice.

Note: *Oracle does not allow you to bill more than the available quantity or higher than the unit price on the PO. If either of those need to be increased, contact the PO requester to create a change order.*

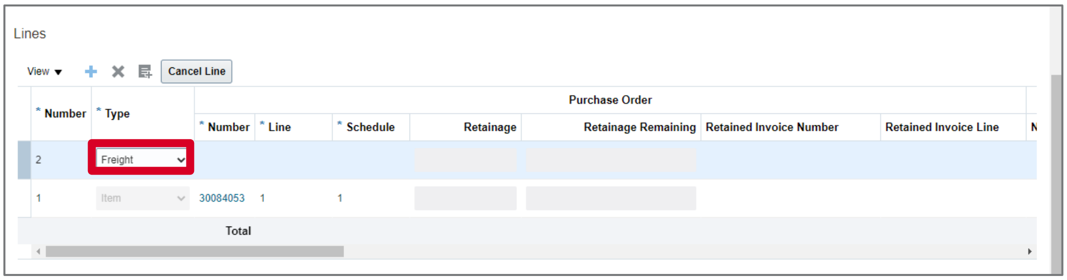


9. To add additional costs, click the **plus sign icon**.

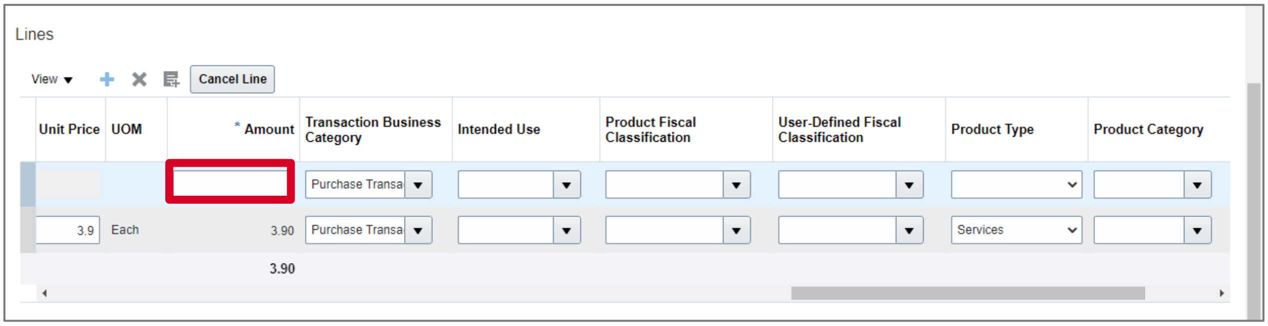


10. Select the PO type (e.g., Freight, Item, Miscellaneous) from the **Type** drop-down menu.

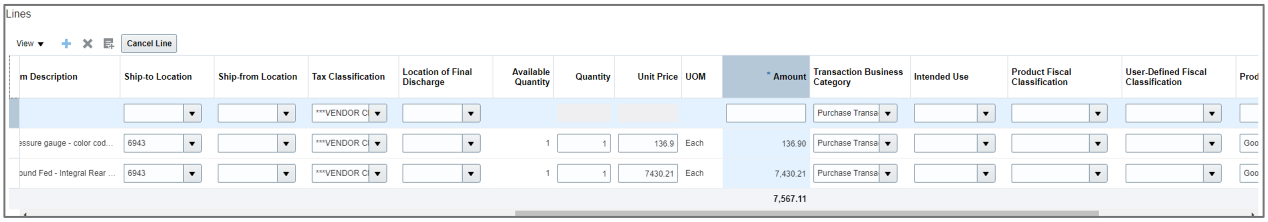
Note: *if there is an item on a PO that needs to be changed or that is missing, contact the PO requester to create a change order. Item/Miscellaneous should only be used for ancillary charges and not for lines not listed on the PO.*

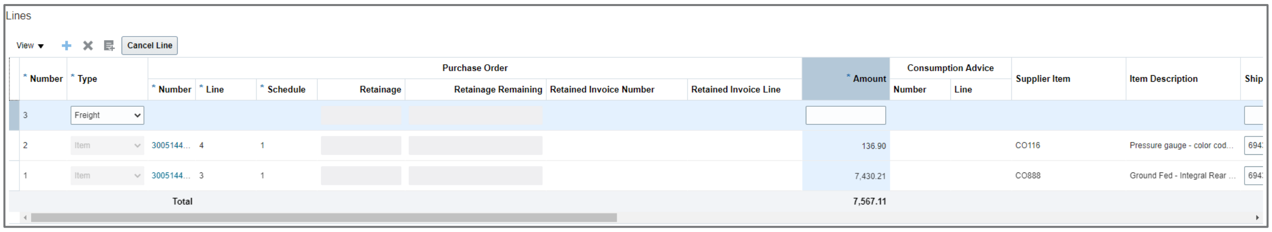


11. Scroll to the right and enter the invoice amount.



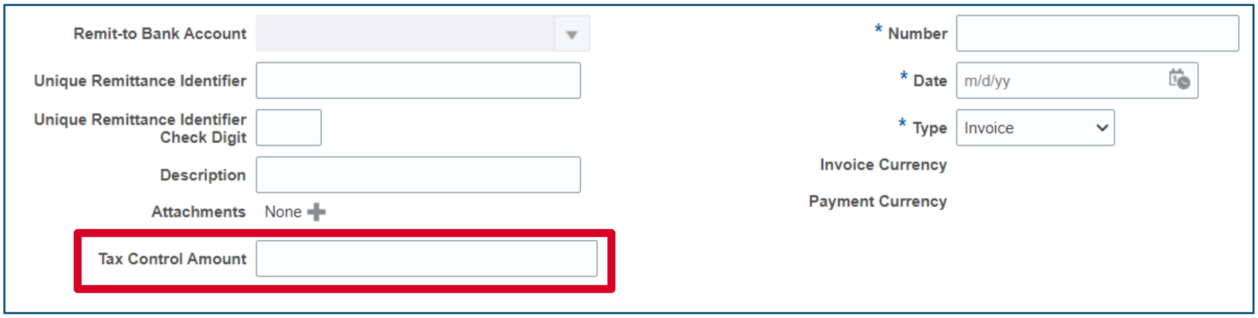
Note: Frequently used columns can be moved by clicking on a column header to select it, then dragging it to where to the desired location. In the example below, *Amount* was highlighted and dragged closer to the left side of the screen.



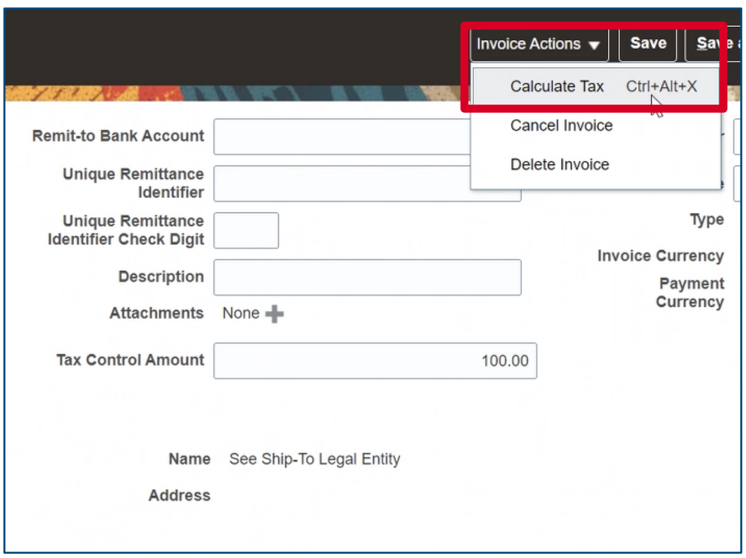


12. Enter applicable taxes (in total dollars) in the **Tax Control Amount** field. Ignore any reference to *Vertex* tax.

Note: *if you are submitting a credit memo and need to credit taxes, enter a negative number in the tax control amount field.*

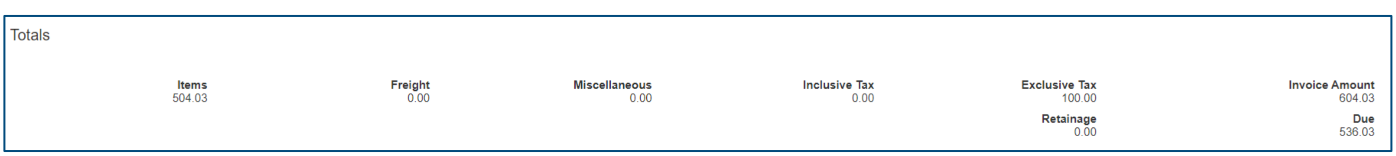


13. Click the **Invoice Actions** drop-down menu in the upper-right corner, then click **Calculate Tax**.



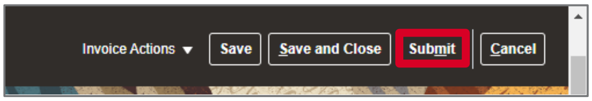
14. Once the tax control amount is calculated, the tax amount appears in the *Totals* section along the bottom.

Note: *The Invoice Amount shown in the Totals section includes any added lines, taxes, and other ad hoc fees (e.g., Miscellaneous, Items, Freight).*



15. Review the invoice for accuracy. If all information is correct, click **Submit**.

Note: *Clicking Save and Close does not submit the invoice for approval. Saved invoices are marked as Incomplete and will be automatically cancelled after seven days. Always try to complete and fully submit an invoice once you begin creating it. If an invoice is still needed after it has been cancelled, please create a new invoice.*



16. The invoice is submitted for approval.

Note: *If you realize you made a mistake on the invoice (e.g., wrong quantity, forgot taxes) and need to resubmit it, email InvoiceChange@republicservices.com to cancel the invoice. Once they confirm the cancellation you can resubmit the invoice through Supplier Portal however you will need to add a suffix to the end of the invoice number as Oracle requires a unique value.*